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The Netherlands

Solid Wood Products

Annual

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Report Highlights:
The Netherlands imports 94 percent of its forest product needs. The value of U.S. forest product exports to the Netherlands amounted to US $36.7 million in 2000, up from $32.1 million in 1999. Opportunities for U.S. exports include Forest Stewardship Council (FSC) wood products.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
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Acronyms

BRL	Certification systems for wood and wood products
CBB	Dutch Court of Justice for Trade and Industry
CCA	Copper Chromium Arsenic Bonds
CSTEE	Scientific Committee for Toxity , Eco-Toxicity and the Environment
CTB	Dutch Board for the Authorization of Pesticides
FNV Bouw	Dutch trade union for the construction sector
FSC	Forest Stewardship Council
HSB	Wooden skeleton construction
IFD	Industrial, flexible and easily dismantled construction
NVT	Dutch Employers Association of Garden Centers
SYP	Southern Yellow Pine
VVNH	Association of Dutch Wood Companies
VWDHZ	Dutch Association for Do-It-Yourself Retail Chains
WEI-IEO	West-European Institute for Wood Preservation
WNF	World Nature Fund

Executive Summary

One of the least wooded areas in Europe, the Netherlands imports 94 percent of its forest product needs. In 2000, total Dutch forest product imports reached U.S. $838 million, a decrease of 6.3 percent over the preceding year. In the first half of 2001, these imports decreased by 13 percent, compared to the same period in 2000.

The U.S. is a major exporter of oak (mainly white oak), other tempered hardwoods, and to a lesser degree softwood plywood to the Netherlands. The value of U.S. forest product exports to the Netherlands was to U.S. $36.7 million in 2000, up from U.S. $32.1 million in 1999. The decline is mostly due to a sharp decrease in U.S. exports of softwood plywood and increased competition by Eastern European countries for oak. Higher U.S. softwood plywood prices (due to a booming domestic demand) and a high U.S. dollar rate contributed to the decline in exports to the Netherlands. In particular, U.S. softwood plywood faces stiff competition from Finnish softwood plywood and Brazilian Eliotti Pine, and European produced OSB and MDF. This trend is likely to continue in 2002.

The Dutch construction industry is doing reasonably well. According to the Dutch State Secretary of Housing, the value of production increased 3.4 percent in value in 2000 and an annual increase of 1.0 percent is expected for 2001. However, a decrease of -0.1 percent is expected for 2002 because of slowdown in the Dutch economy. In 2000, the Dutch government launched the action plan "Use Durable Produced Wood 2000-2004" to increase the use of durable wood in the Dutch construction industry. Therefore, U.S. exports of FSC wood (Forest Stewardship Council) to the Netherlands, like certified Western Red Cedar, Douglas Fir, Redwood and Hemlock offer good opportunities.

The Dutch Ministry of Housing, Spatial Planning and Environment is currently considering a total ban on the use of copper compounds as wood preservatives in the Netherlands. A possible impact of this measure on U.S. exports of forest products to the Netherlands would be relatively minor, although "some" treated Southern Yellow Pine is imported into the Netherlands. In addition, the Dutch government is working on a bill to label all wood, forest products and paper in the Dutch market by January 2003. FSC certified wood will get a green label and uncertified wood will get a red label to make the consumer aware of the origin of wood. Again, FSC certified wood will be the best market potential.

Sales in the Dutch furniture industry were US $ 2.1 billion in 2000. In the first half year of 2001, sales for the Dutch furniture industry increased 5.0 percent, compared to the same period in 2000. Growth in export markets mainly supported the increase in sales. In the first half of 2001, sales in the Dutch interior industry increased 5.5 percent, compared to the same period in 2000. Producers of yacht interiors and store interiors were doing very well with an 11 and 8 percent growth, respectively. It is expected that for the next five years darker colors (like red, brown and pink) will be the trend in wooden furniture and floors. This might have a negative effect on Dutch demand for U.S. white oak. Further on, temperate hardwood faces increasing competition from European wood species, synthetic materials and laminated and foliated sheet materials like MDF. Because of the high U.S. dollar-rate and the small supply of some U.S. wood species, more veneer is being used, instead of massive wood.

The Netherlands: Economic Development					
	1998	1999	2000	*2001	*2002
Gross Domestic Product (%)	3.70	3.70	3.50	1.00	1.50
Unemployment (%)	4.90	4.00	3.60	3.25	3.75
Consumer price inflation (%)	2.00	2.20	2.60	4.50	2.50
Average buying power (%)	1.40	-0.10	0.40	6.75	1.25
Total private consumption (%)	4.10	4.50	3.80	1.20	3.50

Source: Bureau For Economic Policy Analysis (CPB) and 2001 Annual Review The Netherlands (OECD)
* Estimated

Exchange Rate			
Year	U.S. $	EURO	Dutch florin (guilder)
1998	1	-	1.98
1999	1	0.94	2.07
2000	1	1.09	2.39
2001	1	1.12	2.46
2002	1	1.12*	--

* end of April

Production

Forest Situation/Outlook

The Netherlands is one of the least wooded areas in Europe. The Dutch forest area has only a 0.3 percent share in the EU. It has about 341,000 hectares of forest, equivalent to about 10 percent of its total land area (3.4 million hectares). This compares to 36 percent in the EU, 29 percent in Germany, 25 percent in France and 20 percent in Belgium. The largest parts of the Dutch forests were planted between 1920 and 1950.

In 1994, the Dutch Government developed a Forest Policy Plan that would each year add 3,000 hectares of forest land annually with a target of 75,000 new hectares added by the year 2020. This is an ambitious goal, since land is scarce and expensive in The Netherlands. So far, actual planting is far below the goal. Between 1995 and 1999, only 1,200 hectares of forest land were planted annually. The Forest Policy Plan details the Dutch Government's forestry goals for 1994 through 2020 and emphasizes sustainable development of the existing forest by improving the quality of the soil, air and water. According to the government, durable forest management (or forest certification) will contribute to a better image of wood and, therefore, to higher Dutch wood consumption. More consumption could improve the economic situation for the Dutch forest and wood sector. In addition to the plan mentioned above, 400 hectares of forest per year will be planted in the next couple of years in order to capture CO^2.

Composition of the Dutch Remunerative Forest (1999)			
	Softwood		**Tempered Hardwood**
Total Hectares	173,000	**Total Hectares**	143,000
of which (in %)		of which (in %)	
Scotch pine	60	Oak	36
Japanese larch	9	Aspen	17
Douglas fir	11	Beech	9
Norway spruce	8	Other	38
Other	12		

Source: Stichting Bos en Hout

The Netherlands produces only 10 percent of its total wood needs. In The Netherlands, poplar is the main variety for the round wood processing industry (with a share of approximately 30 percent), followed by willow, douglas, larch and spruce. However, the area planted with poplar and larch has decreased by 11 and 5 percent within twelve years, respectively. Therefore, the Dutch wood processing industry, including the traditional wooden clog industry, is concerned about their future supply of wood from Dutch poplar trees. At present, just 100,000 trees are planted annually, whereas 700,000 trees are the minimum number needed to satisfy demand. In 2000, the three-years "Action Plan for Poplar" was launched by the Dutch Institute of Forestry and Forest Products to increase the planting of more poplar trees in the Netherlands. The Action Plan will be carried out by the "Poplar Foundation".

Ownership of the Dutch Remunerative Forest (1997)			
Private Persons	State	Provincial/Local	Nature Conserv. Org.
51 %	37 %	14 %	18 %

Source: Stichting Bos en Hout

Since the "big storm" of 1990, the earnings of the Dutch forestry have lagged behind the costs, partly due to low wood yields. Due to the availability of storm wood in Belgium, Luxembourg, Germany and France, exports of Dutch round wood to neighbouring countries decreased. Smaller forest firms are losing face negative trading results and therefore the number of private forest owners is decreasing. This development is accelerating the gap between larger wood companies and the small Dutch forest area. In 2000, private forest firms with less than 50 hectares forest land lost US $56 per hectare, on average. In 1999, the loss amounted to US $37 per hectare. Compared to the preceding year, the production costs and labor costs were higher and wood yields were smaller. The 2000 wood yields were the smallest in 25 years. Private forest firms with more than 50 hectares forest land showed a loss of US $22 per hectare, on average, in 2000. In the preceding year, they showed a profit of US $17 per hectare.

Solid Wood Products Situation/Outlook

The annual growth of total Dutch forest is about 2.2 million m^3. About 70 percent of the growth is harvested. Therefore, the total standing stock of Dutch wood has increased from 156 m^3 per hectare in 1985 to 198 m^3 per hectare in 2000. Since 1985, the total standing stock increased 20 percent to 55 million^3.

Between 1995-1999, the average annual harvest of Dutch wood was 1.35 million m³. About 73 percent of the harvest consisted of softwood. Compared to the 1993-1997 period, the average annual harvest decreased 100,000 m³. In 2000, the Dutch harvest of wood totaled approximately 1 million m³, of which 879,000 m³ was round wood. The annual harvest of larch was estimated at about 130,800 m³, of douglas 168,800 m³, of spruce 124,000 m³, of pine 461,100 m³, of oak 81,400 m³ and of poplar 127,000 m³. The decreasing harvest is because private forest owners are harvesting less, since the two public forest owners Dutch State Forest (Staatsbosbeheer) and Nature Monuments (Natuurmonumenten) are harvesting more. About 300,000 m³ of round wood is harvested each year in the 90,000 hectares of Dutch State Forest land. Round wood is used by saw mills, the wooden clog industry, the fiber for paper/cardboard and fiber board and for poles and firewood. The 2002 Dutch harvest of round wood is estimated at about the same level as in 2001.

In 2000, the "Action Plan for Wood" was launched by the Dutch Ministries of Agriculture and Economic Affairs. The goal is to increase the harvest of wood to ensure the existence of the Dutch forestry sector in the long run. Although the Netherlands produces only 6.7 percent of its total wood consumption (15.6 million m³ in 2000), the forestry sector contributes a 2 percent to GDP. Total sales of the Dutch wood processing industry is about US$ 6.1 billion. About **43,000 people are employed in the Dutch forestry sector**. According to the plan, an increase in the total planting stock is not necessary, especially since a big planting stock increases the possibility of forest fires. A larger wood harvest can help develop the Dutch forest, since harvesting could change the forest structure. Forest owners could decide whether or not to harvest certain tree species. According to the plan, it is possible to harvest an extra 350,000 m³ wood per year without negative side effects to other forest functions like recreation and nature management. In 2001, the Dutch Ministry of Agriculture, Nature Management and Fisheries launched the project "Wood Harvest Image Improvement" to prove that higher wood harvests will not lower the quality and quantity of the Dutch forest and that replanting is continuing. For the next 3 years, the Ministry will support this project with US$ 405,000.

Although the Netherlands only supplies a small part of its total wood consumption, Dutch wood varieties do compete with wood from abroad. The varieties most used are larch, douglas, spruce, pine, oak and poplar, which can be delivered with a KOMO quality certificate. Dutch ash, robinia, sweet chestnut and elm have also good market opportunities, especially in infrastructure construction. In 2000, almost 25 percent of Dutch wood was FSC (Forest Stewardship Council) certified. In 2001, all Dutch State Forests were FSC certified to 69,064 hectares. The estimated production of Dutch FSC-wood rose from 337,000 m³ in 2000 to 337,000 m³ in 2001, an increase of 34 percent.

Dutch lumber is mostly used for garden and landscape furniture, floors, exterior wall paneling and window-frames. The durability of larch makes it the most popular variety for floors and useful for construction purposes. Dutch forests produce little oak and beech round wood of veneer quality, which could be used for furniture and interior products. However, Dutch oak and beech can be used for inside timbering. Dutch pinewood and poplar wood are sold mainly to the packing and pallet industry.

Policy

Proposed Ban on CCA Treated Lumber

In May 2000, the Dutch Ministry of Public Health, Welfare and Sports implemented a ban on the use of wood preserved with copper compounds (CC and CCA salts) for outside applications. Both the Ministry of Housing, Spatial

Planning and Environment and the Ministry of Agriculture, Nature Management and Fisheries supported the ban. CCA treated wood is especially used in garden furniture, fences and boards. Between 5 and 10 percent of Dutch wood is treated by more than 30 companies. The main part is treated with copper compounds. In 1998, more than 350,000 m^3 wood was preserved with CCA. The main part of the production is produced for the domestic market. Twice the production size is imported, mainly from Scandinavian countries, Poland and other Eastern European countries. Until 2000, about 10-15 percent of all lumber sold by Dutch retailers (mainly garden centers) was preserved with CCA.

The regulation based on the 1998 Directive of the European Parliament on the placing of biocidal products on the market served to ensure that private individuals no longer handle or process wood preserved with copper compounds. Wood preservatives were evaluated as part of an authorization pursuant to the Pesticide Act 1962, and the Dutch board responsible for the authorization of pesticides (CTB) concluded that it was not possible to confirm that certain applications of these agents do not harm the private user. This conclusion, according to the Dutch government, meant it was necessary to prevent imports of wood preserved with these compounds.

However, the European Commission thought that the proposal could be an unjustified trade barrier. Moreover, Dutch authorities can't prove that CCA (Copper Chromium Arsenic bonds) treated lumber is dangerous for the environment and human health. Therefore, The Netherlands was not allowed to implement its proposed Commodities Act Regulation on Preserved Lumber to reduce the use of CCA treated lumber by private persons. As a result, all intended restrictions for the production, use, import, export and sales of preserved wood were abrogated in January 2001. The E.C.'s ruling was based on different research reports showing that there is no unacceptable risk regarding CCA treated lumber. In addition, on behalf of the Dutch wood industry, three companies in the Netherlands instituted legal proceedings at the Dutch court of justice for trade and industry (CBB) against the decisions of CBT regarding CCA treated lumber. According to the Dutch wood industry, the decisions were out of tune with the Dutch law and the European law and were also negligently made by CTB. In November 2000, the CBB required a withdrawal of the decisions of CTB. The Dutch board for the authorization of pesticides cannot appeal against this sentence, since CBB is the highest court. All intended restrictions for CCA treated lumber were abrogated. According to CBB, CTB can't set restrictions for the use of preserved wood, but only for the use of wood preservatives. Although all the restrictions for CCA treated lumber were abrogated by the E.C. and CBB, the Dutch Association for Do-It-Yourself Retail Chains (VWDHZ) and the Dutch Employers Association of Garden Centers (NVT) has decided to ban CCA treated lumber in their stores. According to them, more Dutch customers are concerned about what they called 'poison wood'.

In August 2001, however, the Dutch Ministry of Public Health, Welfare and Sports published a new draft resolution in the Official Journal to ban the import, sales and use of wood preserved with all kinds of copper compounds as of December 21, 2001. This draft resolution is much stricter than the proposed ban on CCA treated lumber, since it includes all copper compounds, outdoor and indoor applications, as well as new and old wood. As a result, CTB has already prohibited the use of five wood preservatives including copper, CC and CCA salts (respectively: Kemwood ACQ 21, Tanalith E 3485, Celfix OX, Super Wolman Salt B, and Super Wolman Salt CO). Procedures such as the comment period and parliamentary procedures could delay implementation up to six months and, therefore, the preservatives mentioned above can still be used. First, the Dutch Council of State will advise on the draft resolution. Second, the European Commission asked the E.U. Scientific Committee for Toxity , Eco-Toxicity and the Environment (CSTEE) to give their opinion on the Dutch draft resolution. CSTEE confirmed some unacceptable risks, including to children's health from the use of wood treated with wood preservatives containing CCA, as well as through ingestion and inhalation of sand particles in playground sand pits. Also, there are some unacceptable risks for human health from the disposal of CCA wood. The disposal risk relates mainly to household burning of waste wood treated with CCA.

An unacceptable risk of harm to aquatic organisms in certain marine waters was also identified. The CSTEE stressed a major concern in relation to a serious knowledge gap in relation to landfills and concluded that it would be advisable to exercise caution by limiting the use of arsenic-based wood preservatives to those situations where it is absolutely necessary.

Regarding risks form disposal, CCA treated wood was recently classified as hazardous under EU legislation on waste. This will ensure that municipal, construction and industrial waste wood is disposed of properly. However, the issue of addressing risks related domestic household burning of CCA treated wood waste is still unresolved. In other areas where unacceptable risks have been identified in relation to waste disposal, there are examples where bans were introduced into Community legislation (e.g. End of Life Vehicles). To address the remaining risks, including those to children's health and from domestic household burning, and concerns that the risks to human health might be greater than previously thought, a draft European Commission Directive would essentially a ban the marketing of CCA treated wood to consumers and restrict its use to essential industrial applications only. In December 2001, the European Commission announced the draft Directive (ENTR PE 2001/144/E3 Arsenic) which departs from a total ban on the use of arsenic compounds for wood treatment, with the exception of industrial preservation for sleepers, poles and cooling tower timbers. According to the E.C., wood preserved with copper compounds should be an alternative but this is forbidden in The Netherlands. If the draft Commission Directive is implemented, it will be extremely difficult to preserve wood in The Netherlands. Alternatives could be modified wood, like Plato wood, Stellac and Perdure, as well as acetyled wood and wood preserved with other biocides (like Woodlife HL 50). However, these alternatives are only available in small amounts. Other alternatives are stone, synthetics and metal. Stakeholders had until February 8, 2002, to provide comments on the draft directive.

The proposed decisions mentioned above would negatively impact U.S. wood products imports, and would eliminate a promising growth sector for U.S. exports to Europe (e.g. treated pine used for decks). However, impacts of this measure on U.S. exports of forest products to the Netherlands would be relatively minor. According to importers, there is "some" treated Southern Yellow Pine (SYP) imported into the Netherlands. Treated SYP is also used in U.S. made roller coasters (two have recently been imported into the Netherlands) and in some U.S. made playground equipment.

Control Mark System

According to research from the World Nature Fund (WNF) published in November 2001, most Dutch timber traders do not care if wood is certified or not. Although 75 percent of the Dutch consumers support durable forestry, about 80 percent of the timber traders do not know the origin of their wood. This is mainly due to lack of interest by the traders, not because of financial reasons. In other words, most traders want the freedom to buy their wood wherever it is available. This means that no trader can guarantee that he exclusively trades in wood which is legally harvested. According to WNF, FSC-wood is still the only reliable quality mark for certified wood. From March 22 to May 31, 2002, the WNF supported campaign "Save the forest, buy FSC-wood" will take place in the stores of large Dutch do-it-yourself retail chains, garden centers and department stores (e.g. Intratuin, Karwei, Europa-tuin, Gamma, Leen Bakker, Kwantum, Praxis, Hema and Blokker). This campaign should increase the consumer's awareness for durable wood. In The Netherlands, 6-8 percent of the altered wood is FSC certified, of which one-third is sold by do-it-yourself stores. Two-thirds is used by the construction sector. Dutch garden centers annually sell between 70,000-100,000 FSC-labeled tables, chairs and seats. Although only 1 percent of the Dutch consumers are familiar with the FSC quality mark, about 1,500 Dutch do-it-yourself stores and garden centers sell FSC-labeled wood and wood products. The main constraints for traders in FSC-labeled wood are difficulties regarding to tracing and tracking of

FSC-labeled wood and the certification of each link in the supply chain. The so called "Chain of Custody" is needed to guarantee that the wood comes from a certified forest. The main constraints for buying the supply of FSC-labeled wood is constrained by higher prices and consumer taste.

The Netherlands is, together with Germany, the fourth largest importer of illegal tropical hardwood in Europe after the United Kingdom, France and Belgium. In 1999, 600,000 m^3 of illegal tropical hardwood was imported into The Netherlands (which is equal to 80,000 hectares of forest) with a value of US$ 145 million. The Netherlands imports about 65 percent of its illegal tropical hardwood from Indonesia. According to the international environmental organization Friends of the Earth, about 50 percent of all imported hardwood into the E.U. is illegal. In 1999, 5 million m^3 of illegal tropical hardwood was imported into the E.U., with a value of US$ 1.4 billion. Recently, the Dutch General Inspection Service (AID) strengthen its port inspections to prevent imports of illegal wood.

In April, 2002, the 6th Conference of the Parties to the Convention on Biological Diversity (CBD Conference) took place in The Hague, The Netherlands. More than 180 countries will discuss the future of the world's virgin forests. Anticipating the Convention, Greenpeace has been conducting a campaign to protect seven virgin forests (Central Africa, Asiatic Russia, Chili/Argentina, Sweden/Finland, Northwest Canada, Amazon area, and Malaysia/Indonesia), that are called the "Magnificent Seven". According to Greenpeace, the Dutch government should only use FSC-wood for public construction (buildings, bridges etc.) as an example to give the right example to the public. Also, more certified wood should be used for the construction of houses at so called "VINEX-locations" (new large sites around existing cities which are build for commuters). Greenpeace also recently boarded some ships with illegal wood at different Dutch ports.

The Dutch government wants to label all wood, forest products and paper in the Dutch market by January 2003. Certified wood, like FSC-wood, would get a green label and uncertified wood would get a red label.. The objective of this measure is to contribute to a world wide extension of certified forests. The Association of Dutch Wood Companies (VVNH) disagrees with obligated labeling. According to them, the current voluntary labeling by Keurhout (the Dutch certification organization for durable wood) and FSC is sufficient to distinguish "green" wood from other wood. In 2001, Keurhout certified 33 million hectares of forest worldwide. The proposed bill would also increase the administrative, organizational and financial burdens for firms in the Dutch wood processing industry. The large Dutch trade union for the construction sector, FNV Bouw, is also against obligated labeling. FNV Bouw is concerned that ecology-conscious consumers will shift to aluminum and synthetics, since most wood will get a red label. It also says that the production of aluminum and synthetics requires more energy than for wood. However, the government believes that the share of certified wood in the Dutch market is not increasing fast enough (with an annual growth rate of 4-8 percent). In 1990, the Dutch government agreed that by 1995, only wood from certified forests should be handled in the Netherlands, but the market share of FSC-labeled timber reached only 2 percent (180,000 m^3) in 1999. In 2000, 4 percent of all timber (330,000 m^3) in the Dutch market was FSC certified, with estimates of 25 percent (3.5 million m^3) in 2003 and 50 percent in 2006 (7 million m^3). Most certified wood is imported from Scandinavia and Canada. The Dutch Good Wood Foundation, founded in 1999 by environmental organizations and wood processing firms, is taking the lead to expand certified wood ousage.

Although the Dutch government wants compulsory labeling of wood, the European Commission rejected a Dutch labeling bill in 2000, which focused mainly on production locations in other member sates and outside Europe. According to the E.C. and WTO, the Netherlands is not allowed to take measures to preserve forests world wide, which means also outside its own territory. After the elections of May 15, 2002, the Dutch government will decide

whether or not they agree with the proposed bill, called the "Vos Act" (named to a member of the Dutch parliament who initiated the proposed bill). However, the Dutch Ministry of Agriculture, Nature Management and Fisheries and the Ministry of Housing, Spatial Planning and Environment, together with NGO's, researchers and market parties are already developing a new Dutch system for wood certification (BRL). This initiative should result in a national judgment directive with requirements for durable forest management by July 2002. Wood that meets these requirements will get a quality mark appointed by the ministries mentioned above. Wood carrying this quality mark would get a green label if the Vos Act is implemented.

The Vos Act could increase U.S. exports of FSC wood, like certified Western Red Cedar, Douglas Fir, Redwood and Hemlock, to The Netherlands.

Wood Packaging

In March 2001, The European Commission has adopted the Decision 2001/219/EC on temporary emergency measures concerning non-manufactured coniferous wood from the United States, Canada, Japan and China. The Decision has been effective since October 1, 2001. The Dutch Ministry of Agriculture, Nature Management and Fisheries has implemented the E.C. Directive through emergency measurements for imports of packaging wood to prevent the spread of the pinewood nematode. This means that only U.S. wood which has been fumigated, chemical impregnated, painted or heated by the "kiln dried" method can still be used as raw material for pallets. At the Dutch boarder, an attestation certifying the use (or the non use) of non-manufactured coniferous wood pallets (proofed by an APHIS stamp) will be asked by the Dutch customs. It is expected that these measures will be valid until the implementation of the IPPC World Standard Phytosanitary Measures Wood Packaging of the FAO.

Trade

The Netherlands imports about 94 percent of its forest product needs. This makes the Netherlands the world's largest importer of forest products in per capita terms. The total value of Dutch forest product imports amounted to US $838 million in 2000, slightly higher than the preceding year. The annual import of wood is about 15 million m³. More than 75 percent of total Dutch wood imports is imported from the E.U., mainly from Sweden, Finland and Germany. North-America has a 20 percent share and about 5 percent is imported from tropical countries.

Some of the Dutch wood imports is re-exported as semi-manufactured products or final products to neighbouring countries, like Belgium, Luxembourg, Germany, France, the United Kingdom and Denmark. The domestic market, however, is by far the most important market for wood and wood products. The total value of Dutch forest product exports in 2000 amounted to US $129 million, slightly lower than the preceding year. The Netherlands exports about 400,000 m³ of lumber (0.3 percent of the world market) and about 300,000 m³ of wooden sheet materials (0.5 percent of the world market).

The Netherlands: Value of Imports of Forest Products

Description	1998	1999	2000	Jan-Jun* 2001	Jan-Jun** 2002
	(in 1,000 Guilders)				
Softwood Logs	24,218	19,060	14,849	19,034	27,790
Temperate Hard. Logs	14,561	19,038	19,763	10,412	9,891
Softwood Lumber	1,052,458	1,058,031	1,127,574	465,708	367,909

Temperate Hard. Lumber	210,653	235,415	241,023	121,874	194,990
Temperate Hard.Veneer	19,999	19,153	20,493	8,373	12,260
Softwood Plywood	166,303	162,049	205,482	116,137	142,849
Other plywood	325,043	339,488	375,101	176,034	184,836
Total***	**1,813,235**	**1,852,234**	**2,004,285**	**917,572**	**940,525**

The Netherlands: Value of Imports of U.S. Forest Products

Description	**1998**	**1999**	**2000**	**Jan-Jun***	**Jan-Jun****
				2001	**2002**
	(in 1,000 Guilders)				
Softwood Lumber	13,233	12,519	13,569	7,222	8,089
Temperate Hard. Lumber	48,285	39,893	57,147	29,547	41,366
Softwood Plywood	54,960	13,999	17,018	4,205	2,103
Total	**116,478**	**66,411**	**87,734**	**40,974**	**51,558**
Total in Dollar equivalent	$58,738	$32,114	$36,693	$16,683	$20,993
% U.S. of Total Value	6.42	3.59	4.38	4.47	5.48
* Revised ** Estimates *** Tropical Hardwood Lumber has been deleted from this table.					
US$ 1= DFL.	1.983	2.068	2.391	2.456	**i** 1.1148*

* **i** 1.00=Dfl. 2.2

Source: Stichting Bos en Hout

Market Segment Analysis

Construction Sector

The Netherlands: Building Production by Sector in Euro Million (2000 prices)				
	2001	2002	2003	2004
Housing Construction	14,330	14,000	14,410	14,850
New Houses	8,960	8,560	8,440	8,920
Renovations	5,370	5,440	5,970	5,930
Utility Construction	11,660	11,500	11,000	10,500
New Buildings	8,160	7,900	7,300	6,700
Renovations	3,500	3,600	3,700	3,800
Infra Structure	7,300	7,510	7,950	7,650
Public Sector	3,650	3,790	4,070	4,000
Market Sector	3,650	3,720	3,880	3,650
TOTAL	33,290	33,010	33,360	33,000
US$ 1 = Euro (**i**)	**i** 1.116	-	-	-

Source: Ministry of Housing, Special Planning & the Environment

Overview

According to the Dutch State Secretary of Housing, the Dutch economy grew only 2.0 percent in 2001 and it should grow about the same in 2002. The Dutch construction industry grew 3.4 percent in value in 2000 and an annual increase of 1.0 percent is expected for 2001. However, a decrease of -0.1 percent is expected for 2002. Reasons for this slow down are the economic decline, the scarcity of labor, and the decrease in housing construction (due to delays in planning, decreasing demand, rising construction costs and high land prices). Construction should increase again between 2003-2007, driven by increasing demand for renovation and maintenance activities (growing 2-3 percent annually).

Industrial, flexible and easily dismantled construction (IFD) is becoming more popular in The Netherlands. Therefore, the use of prefabricated wooden elements, like complete carry-constructions and fronts, is increasing. In the Dutch construction industry, however, wood very much competes with synthetics, with eachg having a market share of about 50 percent. The most popular U.S wood used in the Dutch construction industry is Western Red Cedar. Western Red Cedar is mainly used for exterior wall paneling (bevel siding and channel siding) and to some extent for window frames. Good opportunities exist for Western Red Cedar shingles as roofing. It is estimated that between 15,000-30,000 m^3 of Western Red Cedar is used every year. Douglas Fir is becoming increasingly popular in the Dutch construction industry, mainly for window frames, but also for exterior wall paneling and infrastructure construction.

The new Dutch "Construction Resolution 2002" will be implemented in July 2002 and requires that stairs be easy to walk on. The minimum height of doors is increased to 2.30 meters, from the current 2.10 meters. Doors must also

meet new requirements for quality, form stabiliation, burglar and fire resistance, rain and wind protection, thermic isolation, soundproofing etc. The widely used 38 millimeter door may not be able to meet the new standards, leaving the 54 millimeter door to relace it

The new European fire-classification system for wood should be decided by January 2003 but the implementation of this classification system is the responsibility of each national government themselves. The new system would probably not allow the use of Western Red Cedar for exterior wall paneling and indoor applications in The Netherlands without a fire-resistant treatment. Western Red Cedar would probably get the European class E, while wood of class D or higher is allowed for exterior wall paneling according to the new Dutch "Construction Resolution". Western Red Cedar is the most popular wood specie used for exterior wall paneling in The Netherlands. In general, the EU classification system will be stricter than the current Dutch classification system and some wood species would be prohibitied for certain applications, while others would need a fire-resistant treatment.

Housing Construction

Housing production decreased 2.4 percent in 2001. This was the lowest production since the 1950's caused by a slower economic situation and fewer building permit approved by municipalities (about 55,000 permits in 2001 compared to 91,000 in 2000). Within a couple of years, most of the construction of houses at "VINEX-locations" (new large sites near existing cities which are built for commuters) will be finished. House prices continuously rise, partly due to increasing construction costs. It is expected that the production of housing will increase slightly in 2002, mainly because of the increasing demand for renovation and maintenance activities for so called "post-war" houses which have been build between 1945-1965 .

In The Netherlands, fir is used the most in the housing construction industry, for example in cap constructions of houses, window frames, window sills, doors, stairs, floors, skirting-boards, frames, interior wall paneling, exterior wall paneling, and closets. Deal for outdoor applications has to be treated to be weather resistant. An estimated 2 million m^3 of deal is used per year, mainly imported from Sweden, Finland, Russia and Germany. The use of (American) oak in the housing construction industry is small but increasing. Oak is mainly used for stairs and platforms. In 2001, the total use of wood in the house construction industry amounted to 300,000 m^3. Only a small part was FSC certified.

Utility Construction

Production in the utility sector increased 2.5 percent in 2001. However, a decrease of 1.4 percent is expected in 2002 due to an economic downturn. After the economic boom of the nineties, the production is slowing down but new investments in office buildings and construction for the trade sector, hotel and catering sector and the transportation industry are still taking place. Investments in school building and construction for the public health sector should also increase.

Infrastructure Construction

Infrastructure projects increased 6 percent in 2001, with a 3 percent growth expected for 2002. Projects included preparations for a high speed train track to Belgium, improved freight train links to Germany (from Rotterdam), various cities, and metro systems. Also, large investments in the Dutch telecommunications sector are taking place, especially for internet systems. It is expected that after 2002, expenditures for weirs and road construction will increase. At the moment, successful innovations are taking place regarding to wooden road portals and wooden crash barriers. These innovations are the results of "Project Wood", which was founded in 1996 by the Ministry of Traffic and Hydraulics to stimulate the use of wood in the road construction sector and the hydraulic sector.

The Dutch road construction sector uses wood for road furniture, berm planks, tree and railing-abuts, timber-piles, and acoustic fencing. About 13 percent of the Dutch acoustic fences are made of wood. In the Dutch hydraulic sector many wood species are used for the construction of piers, lock gates, braking constructions, facings, sheet-pile walls, etc. The sheet-pile wall is the most important application with a 28 percent share in total use of wood. About 60 percent of the total 4,000 kilometers of sheet-pile walls are made of wood. Traditionally, much tropical hardwood was used in the Dutch hydraulic sector, because of its strength. Although the Dutch government stimulates the use of wood in the Dutch hydraulic sector, the use of wood is decreasing slightly. This is because of the proposed measurement to encourage the use of certified wood, as well as the proposed ban on wood treated with copper compounds. In 1999, the infrastructure construction industry used 202,500 m^3 wood. Approximately 40,000 m^3 wood was FSC certified.

Action Plans for More (Durable) Wood in the Dutch Construction Industry

In 1997, the Netherlands signed the "Kyoto agreement", designed to significantly reduce the emission of CO^2. An important element in this objective is the promotion of wood as a prime building material. The Dutch government had already launched the action plan "20 Percent More Wood in the Construction Industry" in 1995, with the aim to increase the use of wood in the construction industry by 430,000 m^3 by 2000. A condition of using wood exclusively from forests under responsible, long-term management programs was included, which therefore excluded the use of most tropical hardwoods. Unfortunately, the goal was not reached in 2000. However, economic growth resulted in a relative increase of more expensive and larger houses, which caused a slight increase of wood use per house between 1996 and 2000. In addition, the volume of wood used in wooden frame construction increased 29 percent between 1995 and 1997, while the share of plywood grew 37 percent.

To continue the action plan "20 Percent more Wood in the Construction Industry", the Dutch Ministry of Housing, Spatial Planning and Environment launched "Use Durable Produced Wood 2000-2004" program in 2000. Under this program, 27 projects were developed to increase the use of durable wood in the Dutch construction industry. The Dutch Wood Information Center (Centrum Hout) is coordinating these projects. The action plan excludes the use of most tropical hardwoods, so softwood could be used to fill this gap. By itself, softwood is not durable and, as a building material, has to be protected. Currently, around 25 percent of the wood used in the Netherlands is treated with preservative by specialized companies. The modern Dutch timber preservation industry is leading the rest of Europe. However, as mentioned earlier, it is expected that the current timber preservation tecnique will soon not be allowed in the Netherlands. Alternative wood preservatives are available to replace current timber preservation formulations, while unpreserved wood is also an option. But then a shorter service life is introduced. According to the Western-Europe Institute for Wood Preservation (WEI-IEO), this is economically unacceptable and environmentally undesirable since an untreated wood product would have to be replaced five to six times more often. In the meantime, modification methods are being developed whereby wood is modified by a high temperature treatment process (like the innovative Dutch Platohout). This method of preservation is still in its early stages of development and its energy and water consumption is 10-15 times higher as normal. The use of more naturally durable hardwoods is another possible alternative. However, the European hardwood species have restricted applications and tropical hardwoods will still be preferred because of their known performance characteristics.

With reference to the action plan "20 Percent more Wood in the Construction Industry", the Dutch government and the Dutch construction industry are developing the implementation plan "More Wood for Construction" which should be implemented in 2003. This plan would increase the use of wood in the construction industry to decrease the use of concrete sand and mortal sand. The reason behind this objective is the increasing pressure from Dutch environmental groups to slow down the mining of concrete sand, mortal sand and gravel to safeguard the Dutch landscape. To

increase the use of wood, the government supports wooden skeleton construction (HSB), wooden floors, wooden carry-constructions, prefabricated wooden elements, timber-piles and wooden bridges.

A possible impact of the above measures on U.S. exports of forest products to the Netherlands is an increase of FSC wood, like certified Western Red Cedar, Douglas Fir, Redwood and Hemlock.

The Dutch Wood Processing Industry

Furniture & Interiors Sector

Dutch furniture industry sales were US $2.1 billion in 2000. In the first half year of 2001, sales in the Dutch furniture industry increased 5 percent, compared to the same period in 2000. This increase was driven by a 14 percent increase in exports by the largest furniture companies. Producers of dining and living room furniture are doing very well at the moment, while producers of cupboards face less sales than last year. It is expected that the Dutch furniture industry will face increasing production costs (high labor costs and high prices for raw materials) and competition by lower cost countries like Eastern European countries, China and Indonesia. In addition, the demand for furniture is decreasing due to a slower Dutch economy but it is expected that demand will increase again in 2003. To compete with lower cost countries, the Dutch furniture industry will increasingly concentrate on the middle and higher segments of the market and try to add value through better design, quality and more reliable deliveries.

The Netherlands: Turnover Furniture Industry*
in millions of Dutch Guilders

	1997	1998	1999	2000
Sales	4,370	4,764	5,041	5,091

* Wood & metal
Source: Central Bureau of Statistics

The popularity of (European) oak is currently high, while darker wood varieties are slowly becoming more accepted in The Netherlands. Of the light wood varieties, white oak, beech, cherry, alder and birch are used the most in the Dutch furniture industry. The darker varieties, like walnut and dark oak, increased their market share but it is still small compared to the market share of light wood. However, the trend for the next five years is expected to be darker colors like red, brown and pink. The demand for tropical hardwood like teak, wengé, padoek and palissander is increasing too. The demand for FSC-certified wooden furniture is still small. Combining wood with rattan, metal, synthetics or glass is getting more attention, partly due to the increasing demand for hard design. In addition, the consumer is looking for comfort and multi-functionality. The main trends are ‘Retro’, ‘Countryside’ and ‘Lounging and clubbing’.

The Netherlands: Production of Wooden Furniture and Interiors in millions of Dutch Guilders				
	1997	**1998**	**1999**	**2000***
Chairs, couches, etc.	554	554	568	546
Office and store furniture, & inter.	605	637	749	748
Bedroom furniture	157	161	155	153
Living room furniture	230	223	256	240
TOTAL	1,546	1,575	1,728	1,687

* Estimates
Source: CBS

The Netherlands: Trade in Wood Furniture and Interiors in millions of Dutch Guilders					
		1997	**1998**	**1999**	**2000**
Exports	Wood	690	676	727	772
	Metal	439	437	511	554
	Synthetics	-	134	225	261
Imports	Wood	1,890	1,918	2,180	2,418
	Metal	583	627	678	753
	Synthetics	-	457	703	724

Source: Central Bureau of Statistics (CBS)

Both massive wood and veneer find their way to the Dutch furniture industry and they have almost an equal share. The use of multi-plywood is decreasing. In general, veneer wood competes with synthetic, laminated and foliated sheet materials, like MDF. In 2001, the Dutch furniture industry used 205,000 m³ of lumber, 24,000 m³ of imported wooden components and 355,000 m³ of wooden sheet materials. Hardwood has a 64 percent share in total lumber used, while softwood has a 36 percent share. The most popular lumber species for the furniture industry are deal (30%), European oak (26%), beech (13%), cherry (8%), American oak (7%) and pinewood (6%). Because of the high US-dollar rate, the use of U.S. oak is decreasing in the Dutch furniture industry. The most popular wooden sheet materials are chipboard (48%), MDF (26%), and plywood (21%). It is expected that the market share of MDF in the Dutch furniture industry will expand strongly in the near future, since new specialties like fire-retardant and damp-resistant MDF will drive out standard MDF. In 2000, the Dutch consumption of MDF increased 13 percent to 270,000 m³. In 2015, a consumption of 16-18 million m³ is predicted. So far, there is little demand for FSC certificated MDF.

The Netherlands: Purchases of Lumber & Sheet materials by Furniture Manufacturers in millions of Dutch guilders			
	1997	**1998**	**1999***
Wood, not processed	8.7	5.7	-
Sawn wood	29.5	34.4	26
Of which: - tropical wood	1.1	1.7	1
- softwood	11.4	12.0	11
Veneer and sheet material	186.0	200.4	148
Of which: - sheets of wood/wood waste	138.4	150.5	108
- veneer	3.1	3.9	2
- plywood	33.2	34.4	29
Frames for chairs, couches	36.4	46.0	-
Other wood and wooden materials	11.6	11.3	-

* Preliminary
Source: CBS

Interior Industry

In the first half year of 2001, sales in the Dutch interior industry increased 5.5 percent, compared to the same period in 2000. Producers of yacht and store interiors were doing very well with an 11 and 8 percent growth, respectively. In the interior industry, veneer wood competes with synthetic, laminated and foliated sheet materials, like MDF. The most popular wood species are oak, ash, American walnut and beech. Cherry is becoming popular again, while the demand for multi-plywood birch, fuma, poplar,and ceiba is increasing. The demand for very dark varieties, like wengé, is increasing slowly. Mahonia and teak are used the most for yacht interiors. In general, the polularity of combining wood with metal and glass is on the rise.

Garden Industry

Dutch garden industry sales were US $1.5 billion in 2000. In the last half year of 2001, sales in the Dutch garden industry decreased 5.5 percent, because of a decrease in large garden maintenance and unfavorable weather conditions. Sales should increase in 2002. The use of wood in gardens has greatly increased in the last couple of years. Preserved softwood and tropical hardwood are used the most, because of their longevity.

Teak is the most popular wood specie for wooden garden furniture but the demand for beech and balau is increasing. As in the interior industry, combining wood with rattan, metal or synthetics is becoming more popular. For garden wood (used for fences, wickets, platforms, bridges, etc.) bangkirai is very popular, followed by preserved deal and western red cedar. Tropical wood species, like cumaru, cardeiro, piqua, sucipira, itauba, keruing, angelim pedra, angelim vermehlho, azobé, massaranduba and teak are becoming more popular. Indonesia and Brazil are the main import markets for garden wood. However, the proposed Dutch ban of the use of copper compounds as wood preservatives has increased the use of robinia, chestnut, Siberian larch and modified wood products, like plato wood and stellac wood.

From March 22 to May 31, 2002, the WNF supported campaign "Save the forest, buy FSC-wood" took place in the stores of large Dutch do-it-yourself retail chains, garden centers and department stores (e.g. Intratuin, Karwei, Europa-tuin, Gamma, Leen Bakker, Kwantum, Praxis, Hema and Blokker). This campaign was designed to increase the consumer's awareness for durable wood.

Flooring Industry

The Dutch flooring sector continues to grow. The most popular wood species for flooring are oak (42.6%), beech (21.7%), tropical species (13.6%), maple (9.2%), ash (3%), cherry (2.5%) and birch (2%).
In the Netherlands, the total sales of the boarded floor market, the parquet floor market and the laminate floor market amounted to US $ 95 million, US $ 160 million and US $ 151 million in 2000, respectively. The boarded floor market increased the most (12 percent in 2000). Between 1995 and 2000, the Dutch parquet floor market increased 18 percent. On average, 0.23 m^3 of parquet floor per capita was used in 2000. It is expected that the sales of parquet floors will stagnate in 2002, partly due to less housing construction. Parquet floors, however, are also suitable for the renovation market. Increasing production of parquet floors in The Netherlands may lead to lower prices. The Dutch consumption of laminate floors decreased from 12.7 million m^3 to 10.5 million m^3 in 2001. Recently, OSB was introduced in the Dutch floor market (pressed bamboo parquet floors) . The floor market offers good opportunities for MDF too but there has been little demand for FSC certificated MDF.

Dutch manufacturers appear to be using a wider range of species and more FSC wood. The demand for smoked oak, maple, larch, robinia, purple wood, ruby wood, steamed walnut is increasing fast in the Dutch flooring market. Although temperate hardwoods dominate the market for hardwood flooring, there are signs that tropical species, such as merbau, iroko, afzelia, teak, wengé and basralocus, are becoming more fashionable. The latest trend is Brazilian wood, like jatoba, muiracatiara, sucupira preta and ipé. In addition, the increase in demand for rustic or character grades has enabled producers to make greater use of European hardwood supplies, particularly with oak and beech. Therefore, the competition for U.S. hardwoods from European hardwood supplies (especially new sources in Easter Europe) is very real and will pose an increasing threat to U.S. hardwood share in the future.

Flooring is the main market for American hardwoods. Demand is particularly good for wide board solid flooring (6 and 8 inch widths). In the Dutch flooring market, white oak is the leading U.S. specie but cherry and hard maple are also popular. However, the demand for hard maple is decreasing because of high prices. In the parquet floor market, the demand for U.S. red oak is increasing. The demand for Ponderosa pine and White pine is increasing in the boarded floor market. However, the purchasing of raw materials needs more and more time and effort. This is also the case for U.S. wood, due to the high U.S. dollar rate and the large demand for U.S. wood in the domestic market.

Material Handling Industry

Industry Outlook

The Dutch material handling industry is quite concentrated. Annual total sales of the industry is about US $ 275 million, with between 17 and 18 million pallets produced each year. These pallets are used for limited and multiple use, packaging-cases and crates (for vegetables, fruit and wine), and industrial and export packages. The demand for multiple use pallets is increasing, at the expense of limited use pallets. Therefore, there is a shift from the use of hardwood to the use of high quality softwood. Demand for synthetic pallets is also increasing but the market share is small and they only used for specific applications. In 2001, the material handling industry used 666,000 m^3 of lumber

and 54,000 m³ of sheet materials. The most popular lumber species for the material handling industry are deal (62%), pinewood (23%), poplar (8%), and beech (3%). The most popular wooden sheet materials are chipboard (80%), hardboard (7%) and plywood (6%).

The Netherlands: Industrial Sales of Wooden Packaging Material
in millions of guilders

	1996	1997	1998	1999	2000
Wooden Pallets	325	341	353	327	393
One-way Pallets	181	224	242	223	262
Returnable Pallets	144	118	111	104	132
Box Pallets	43	51	75	65	57
Crates	88	86	88	79	-

Source: Central Bureau of Statistics

Strategic Indicator Tables for The Netherlands

Forest Product Strategic Indicator Tables for the Netherlands			
CONSTRUCTION MARKET			
	2000	**2001**	**2002**
Country:	Previous	Current	Following
Report Year:	Calendar Year	Calendar Year	Calendar Year
Total Housing Starts (thousand units)	71	65	60
--of which, wood frame (thousand units)	7	6	6
--of which, steel, masonry, other materials (thousand units)	64	59	54
--of total starts, residential (thousand units)	--	--	--
----of residential, single family (thousand units)	80%	80%	80%
----of residential, multi-family (thousand units)	20%	20%	20%
--of total starts, commercial (thousand units)	N.A.	N.A.	N.A.
Total Value of Commercial Construction Market ($US mil)	$8,599	$8,029	$7,670
Total Value of Repair and Remodeling Market ($US million)	$4,931	$4,812	$4,875
FURNITURE & INTERIORS MARKET			
Country:	Previous	Current	Following
Report Year:	Calendar Year	Calendar Year	Calendar Year
Total Housing Starts (number of units)	71,000	65,000	60,000
Total Number of Households ('000 households)	6,819	6,894	6,970
Furniture Production ($US million)	2,130	1,863	1,630
Total Furniture Imports ($US million)	1,327	1,275	1,225
Total Furniture Exports ($US million)	555	515	478
Interiors Market Size ($US million)	N.A.	N.A.	N.A.

MATERIAL HANDLING MARKET

Country:	Previous	Current	Following
Report Year:	Calendar Year	Calendar Year	Calendar Year
Total Value of Industrial Output ($US million)	$387	$393	$399
New Pallet Production (million units)	N.A.	N.A.	N.A.

FOREST AREA

Country:	Previous	Current	Following
Report Year:	Calendar Year	Calendar Year	Calendar Year
Total Land Area (million hectares)	3.4	3.4	3.4
Total Forest Area (million hectares)	0.3	0.3	0.3
--of which, Commercial ('000 hectares)	316	314	314
----of commercial, tropical hardwood ('000 hectares)	0	0	0
----of commercial, temperate hardwood ('000 hectares)	173	155	155
----of commercial, softwood ('000 hectares)	143	159	159
Forest Type ('000 hectares)	300	300	300
--of which, virgin ('000 hectares)	0	0	0
--of which, plantation ('000 hectares)	113	100	100
--of which, other commercial (regrowth) ('000 hectares)	228	239	239
Total Volume of Standing Timber (thousand cubic meters)	62,633	61,702	60,785
--of which, Commercial Timber ('000 cum)	58,249	57,384	56,532
Annual Timber Removal ('000 cum) 1/	1,500	1,500	1,500
Annual Timber Growth Rate ('000 cum)	2,400	2,400	2,400
Annual Allowable Cut ('000 cum)	N.A.	N.A.	N.A.

1/ If Removals exceeds growth rate, analyze impact in text.

WOOD PRODUCTS SUBSIDIES

Country:	Previous	Current	Following
Year of Report	Calendar Year	Calendar Year	Calendar Year
Total Solid Wood Export Subsidy Outlay ($US million)	No	No	No
Is there a ban on the export of logs, lumber, or veneer? 1/	No	No	No
Are there export taxes (yes/no)? 2/	No	No	No
Total Wood Production Subsidy ($US million)	0	0	0
Scope (thousands of hectares)	--	--	--
Are there other wood products export expansion activities? 1/	No	No	No

1/ If yes, describe in report.

2/ If yes, identify in Tariff and Tax Strategic Indicator Table.

2/ Calculate as tariff plus other import taxes/fees assuming a commodity value of $100.

FOREST PRODUCT TARIFFS AND TAXES TABLE

The same for all European Union Countries

Production, Supply and Distribution

Softwood Lumber and Logs

PSD Table						
Country	Netherlands					
Commodity	Softwood Lumber				1000 CUBIC METERS	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Production	205	247	210	301	0	367
Imports	2920	2957	2950	3023	0	3090
TOTAL SUPPLY	3125	3204	3160	3324	0	3457
Exports	285	311	290	337	0	365
Domestic Consumption	2840	2893	2870	2987	0	3092
TOTAL DISTRIBUTION	3125	3204	3160	3324	0	3457

The Netherlands imports about 95 percent of its softwood lumber needs. However, a relatively small part of total wood imports come from the United States. In 2000, the U.S. exported about 6,851 m³ of softwood lumber to the Netherlands, which is a negligible part of the Dutch softwood lumber consumption. The high U.S. dollar rate is a constraint, as well as the large domestic demand in the United States which causes higher prices for U.S. softwood lumber, especially for Western Red Cedar.

U.S. species are used for special purposes such as the manufacturing of ladders and in maritime applications. Western Red Cedar is the most popular wood specie used for exterior wall paneling in The Netherlands. In the past few years, U.S. softwoods such as Western Red Cedar, Douglas Fir and Hemlock have sometimes replaced, tropical hardwoods in the manufacturing of window-frames and joinery. Imports of U.S. finger jointed products have decreased, because the Dutch insist on the Dutch KOMO quality specification.

Western Red Cedar is very popular in the Dutch construction industry because of its durability. It is mainly used for exterior wall paneling (bevel siding and channel siding) and to some extent for window frames. Good opportunities exist for Western Red Cerda shingles as roofing. It is estimated that between 15,000-30,000 m³ of Western Red Cedar is used each year. Douglas Fir is becoming increasingly popular in the Dutch construction industry for window frames, and exterior wall paneling. In addition, it is used for infrastructure construction. Since the end of 1997, there has been a noticeable increase in Dutch imports of California Redwood (Giant Sequoia), which is mostly used for the manufacture of garden wood. Redwood is also imported laminated and finger jointed for exterior wall paneling and for decking. California Redwood, like Douglas Fir, fills the hole left by Western Red Cedar, which is limited due to the large demand in the U.S. domestic market. Therefore, the market share of Cvalifornia Redwood should grow. This is also the case for laminated and finger jointed Douglas Fir. The increasing market share of Douglas Fir is driven by applications in construction (especially for window-frames), stimulated by the Dutch action plans "20 Percent More Wood in the Construction Industry" and "Use Durable Produced Wood 2000-2004". The popularity of Hemlock is decreasing because of the high U.S. dollar rate and low prices for Scandinavian softwood lumber.

Imports of softwood lumber in the Netherlands depend mostly on the activities in the construction sector. The Dutch government promotion of timber use in the construction of houses and other buildings is helpful and this program publicize the insulation properties of timber frame housing and the renewable aspect of timber. The Dutch construction sector is expected to increase about 1 percent in 2001 but a decrease of -0.1 percent is expected for 2002. Reasons for this slow-down are the economic decline, the scarcity of labor, and the decrease in housing construction (due to delays in planning, decreasing demand and rising construction costs and ground prices). Construction is expected to increase again from 2003-2007, mainly because of the increasing demand for renovation and maintenance activities (between 2-3 percent).

Trade

Softwood Lumber

Import Trade Matrix					Import Trade Matrix			
Country	Netherlands				Country	Netherlands		
Commodity	**Softwood Lumber**				Commodity	**Softwood Lumber**		
Time period	Jan-Dec	Units:	m3		Time period	Jan-Jun	Units:	m3
Imports for:	1999		2000		Imports for:	2000		2001
U.S.	7,377	U.S.	6,851		U.S.	3,380	U.S.	4,069
Others		Others			Others		Others	
Belgium/Lux*	129,608		115,330		Belgium*	63,950		51,168
Germany	229,659		266,311		Germany	129,624		114,915
Sweden	946,257		809,799		Sweden	456,107		349,550
Finland	588,015		576,473		Finland	294,849		272,722
Russia Fed	403,761		559,427		Russia Fed	262,903		194,200
Norway	130,560		110,793		Norway	61,610		41,136
Latvia	127,516		149,618		Latvia	81,845		68,620
Estonia	72,627		82,547		Estonia	42,946		56,805
Poland	56,250		57,412		Poland	34,907		19,993
Belarus	52,590		69,828		Belarus	35,562		36,359
Total for Others	2,736,843		2,797,538		Total for Others	1,464,303		1,205,468
Others not Listed	147,812		152,384		Others not Listed	82,702		68,260
Grand Total	2,892,032		2,956,773		Grand Total	1,550,385		1,277,797

Belgium/Lux: Starting on the year 2000, Belgium and Luxembourg will be given separately.

Export Trade Matrix					**Export Trade Matrix**			
Country	Netherlands				Country	Netherlands		
Commodity	**Softwood Lumber**				Commodity	**Softwood Lumber**		
Time period	Jan-Dec	Units:	m3		Time period	Jan-Jun	Units:	m3
Exports for:	1999		2000		Exports for:	2000		2001
U.S.	808	U.S.	611		U.S.	1,308	U.S.	1,049
Others		Others			Others		Others	
Belgium/Lux*	154,861		136,208		Belgium*	59,642		52,770
Germany	52,083		51,243		Germany	33,672		11,735
France	8,599		18,857		France	6,278		5,823
Portugal	3,996		5,976		Portugal	3,320		2,723
U.K.	10,934		8,089		U.K.	4,699		1,331
Japan	18,678		34,218		Japan	17,365		26,399
Cape Verde	1,661		1,602		Cape Verde	1,150		549
Total for Others	250,812		256,193		Total for Others	126,126		101,330
Others not Listed	6,592		12,304		Others not Listed	6,679		3,508
Grand Total	258,212		269,108		Grand Total	134,113		105,887
Belgium/Lux: Starting on the year 2000, Belgium and Luxembourg will be given separately.								

PSD Table						
Country	Netherlands					
Commodity	Softwood Logs				1000 CUBIC METERS	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Production	400	651	0	645	0	639
Imports	220	185	0	152	0	133
TOTAL SUPPLY	620	836	0	797	0	772
Exports	220	158	0	142	0	128
Domestic Consumption	400	678	0	655	0	644
TOTAL DISTRIBUTION	620	836	0	797	0	772

Trade

Softwood Logs

Import Trade Matrix					Import Trade Matrix			
Country	Netherlands				Country	Netherlands		
Commodity	**Softwood Logs**				Commodity	**Softwood Logs**		
Time period	Jan-Dec	Units:	m3		Time period	Jan-Jun	Units:	m3
Imports for:	1999		2000		Imports for:	2000		2001
U.S.	0	U.S.	0		U.S.	0	U.S.	0
Others		Others			Others		Others	
Belgium/Lux*	105,478		80,149		Belgium	43,292		40,270
Germany	77,001		70,071		Germany	50,666		25,418
Finland	0		0		Finland	8,407		0
Russia Fed.	0		0		Russia Fed.	0		68,978
					Estonia	0		6,356
					Latvia	0		6,347
Total for Others	182,479		150,220		Total for Others	102,365		147,369
Others not Listed	2,122		2,121		Others not Listed	1,818		1,152
Grand Total	184,601		152,341		Grand Total	104,183		148,521
Belgium/Lux: Starting on the year 2000, Belgium and Luxembourg will be given separately.								

Export Trade Matrix					**Export Trade Matrix**			
Country	Netherlands				Country	Netherlands		
Commodity	**Softwood Logs**				Commodity	**Softwood Logs**		
Time period	Jan-Dec	Units:	m3		Time period	Jan-Jun	Units:	m3
Exports for:	1999		2000		Exports for:	2000		2001
U.S.	0	U.S.	0		U.S.	0	U.S.	0
Others		Others			Others		Others	
Belgium/Lux*	136,679		119,050		Belgium	57,688		174,165
Germany	21,377		15,327		Germany	6,286		19,165
Luxembourg	--		6,733		Luxembourg	5,304		10,308
Total for Others	158,056		141,110		Total for Others	69,278		203,638
Others not Listed	39		416		Others not Listed			55
Grand Total	158,095		141,526		Grand Total	69,278		203,693
Belgium/Lux: Starting on the year 2000, Belgium and Luxembourg will be given separately.								

Production, Supply and Distribution

Softwood Plywood

PSD Table						
Country	Netherlands					
Commodity	Softwood Plywood				1000 CUBIC METERS	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Production	0	0	0	0	0	0
Imports	250	274	260	310	0	350
TOTAL SUPPLY	250	274	260	310	0	350
Exports	15	15	20	16	0	18
Domestic Consumption	235	259	240	294	0	332
TOTAL DISTRIBUTION	250	274	260	310	0	350

The Netherlands depends on imports for its softwood plywood needs. In 2000, the U.S. lost its role as the largest supplier. In just the past few years, Finland became a strong competitor. Importer cite the advantage of finnish softwood plywood below:

- Dutch users consider Finnish softwood plywood of a higher quality than U.S. plywood.
- Finnish softwood plywood can be delivered within one week.
- Finnish price quotes can be fixed for 6 months.

Brazil is also becoming an important competitor. The exports of Brazilian softwood plywood (eliotti pine) and Chilean softwood plywood (radiata pine) to the Netherlands has greatly risen since 1997.

At the moment, nine European mills produce OSB, compared to three mills in 1990. The European production of OSB increased 1 million m^3 in the second half of the 1990's. A production of 2 million m^3 is expected for the near future. In The Netherlands, the first FSC-certified OSB is now on the market. Therefore, an increasing European OSB production, stiff competition by Finnish, Brazilian and Chilean plywood producers, higher U.S. softwood plywood prices (due to a booming domestic demand), and a high U.S. dollar rate contributed to an enormous decline in exports of U.S. softwood plywood to Europe. In 2000, the annual sales of U.S. softwood plywood in Europe was only 10 percent of 1995 sales.

Imports of softwood plywood in the Netherlands depend mostly on the activities in the construction sector. As mentioned before, the Dutch construction sector is expected to increase about 1 percent in 2001 but a decrease of -0.1 percent is expected for 2002.

Trade

Softwood Plywood

Import Trade Matrix					Import Trade Matrix			
Country	Netherlands				Country	Netherlands		
Commodity	**Softwood Plywood**				Commodity	**Softwood Plywood**		
Time period	Jan-Dec	Units:	m3		Time period	Jan-Jun	Units:	m3
Imports for:	1999		2000		Imports for:	2000		2001
U.S.	23,054	U.S.	25,680		U.S.	25,369	U.S.	6,594
Others		Others			Others		Others	
Belgium/Lux*	10,063		19,669		Belgium	9,385		5,270
France	18,727		20,669		France	10,029		6,601
Ireland	19,914		14,351		Ireland	9,781		8,314
Finland	105,025		124,617		Finland	36,282		53,330
Canada	25,032		15,892		Denmark	0		10,601
Chile	9,118		5,084		Canada	14,571		8,986
Russia Fed.	5,858		11,608		Russia Fed.	5,832		18,226
Brazil	4,950		13,459		Brazil	4,102		35,366
Latvia	2,237		3,136		Latvia	1,895		1,675
					Chile	3,001		6,430
Total for Others	200,924		228,485		Total for Others	94,878		154,799
Others not Listed	19,114		20,140		Others not Listed	9,528		6,644
Grand Total	243,092		274,305		Grand Total	129,775		168,037
Belgium/Lux: Starting on the year 2000, Belgium and Luxembourg will be given separately.								

Export Trade Matrix					Export Trade Matrix			
Country	Netherlands				Country	Netherlands		
Commodity	**Softwood Plywood**				Commodity	**Softwood Plywood**		
Time period	Jan-Dec	Units:	m3		Time period	Jan-Jun	Units:	m3
Exports for:	1999		2000		Exports for:	2000		2001
U.S.	43	U.S.	153		U.S.	19	U.S.	28
Others		Others			Others		Others	
Belgium/Lux*	7,617		7,684		Belgium*	3,933		3,402
Germany	1,794		4,303		Germany	1,959		2,248
France	1,217		247		France	288		2,010
U.K.	728		180		U.K.	124		1,482
Total for Others	11,356		12,414		Total for Others	6,304		9,142
Others not Listed	1,905		2,178		Others not Listed	202		648
Grand Total	13,304		14,745		Grand Total	6,525		9,818
Belgium/Lux: Starting on the year 2000, Belgium and Luxembourg will be given separately.								

Other Plywood

Import Trade Matrix					Import Trade Matrix				
Country	Netherlands				Country	Netherlands			
Commodity	Other Plywood				Commodity	**Other Plywood**			
Time period	Jan-Dec	Units:	m3		Time period	Jan-Jun	Units:	m3	
Imports for:	1999		2000		Imports for:	2000		2001	
U.S.	99	U.S.	89		U.S.	0	U.S.	0	
Others		Others			Others		Others		
Belgium/Lux*	81,781		79,667		Belgium*	37,712		36,197	
France	63,998		72,394		France	32,929		33,464	
Germany	2,951		2,524		Germany	1,353		2,220	
Finland	29,951		36,439		Finland	12,023		15,989	
Indonesia	32,771		15,480		Indonesia	8,912		9,546	
Russia Fed.	11,562		10,585		Russia Fed.	3,720		4,840	
Israel	6,597		8,343		Israel	4,277		4,711	
Belarus	2,678		2,096		Belarus	1,150		956	
Malaysia	2,506		1,889		Malaysia	1,618		0	
Secret	42,489		41,548		Secret	20,703		0	
Total for Others	0		270,965		Total for Others	124,397		107,923	
Others not Listed	295,305		19,486		Others not Listed	11,528		33,150	
Grand Total	295,404		290,540		Grand Total	135,925		141,073	
Belgium/Lux: Starting on the year 2000, Belgium and Luxembourg will be given separately.									

Export Trade Matrix					**Export Trade Matrix**				
Country	Netherlands				Country	Netherlands			
Commodity	**Other Plywood**				Commodity	**Other Plywood**			
Time period	Jan-Dec	Units:	m3		Time period	Jan-Jun	Units:	m3	
Exports for:	1999		2000		Exports for:	2000		2001	
U.S.	99	U.S.	89		U.S.	126	U.S.	54	
Others		Others			Others		Others		
Belg/Lux*	23,166		20,658		Belgium*	10,099		8,690	
France	4,418		5,635		France			1,284	
Germany	3,983		3,987		Germany			2,073	
Italy	1,054		1,309		Italy			322	
Total for Others	0		31,589		Total for Others	10,099		12,369	
Others not Listed	34,117		2,777		Others not Listed	5,621		1,726	
Grand Total	34,216		34,455		Grand Total	15,846		14,149	
Belgium/Lux: Starting on the year 2000, Belgium and Luxembourg will be given separately.									

Production, Supply and Distribution

Temperate Hardwood Logs and Lumber

PSD Table						
Country	Netherlands					
Commodity	Temperate Hardwood Logs				1000 CUBIC METERS	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2000		01/2000
Production	234	234	0	237	0	240
Imports	140	140	0	157	0	176
TOTAL SUPPLY	374	374	0	394	0	416
Exports	72	72	0	53	0	39
Domestic Consumption	302	302	0	341	0	377
TOTAL DISTRIBUTION	374	374	0	394	0	416

According to Dutch traders, U.S. temperate hardwood logs imported in the Netherlands are all re-exported to either Belgium or Germany for veneer manufacturing. The production of veneer in the Netherlands is insignificant and is replaced by imports from either the U.S. or East European countries. It is clear that American hardwoods are coming under more intense competitive pressure from European hardwoods, due to the high dollar exchange rate, agressive marketing, improved quality and good availability of Eastern European production.

For a large part, the Netherlands depends on imports to cover its oak and other temperate hardwood needs. The U.S. is a significant supplier of oak, mostly white oak. Other species, like U.S. cherry, hard maple, ash and tulipwood are in demand as well. U.S. temperate hardwoods are mostly used in the furniture industry and for floors. White oak, hard maple and cherry make up approximately 70 percent of all U.S. wood used in the Dutch furniture and flooring industry. In 2000, the Dutch demand for U.S. maple, cherry, ash, red oak, tulipwood, walnut, and birch increased, while the demand for U.S. white oak, western red alder, and hickory and pecan decreased.

For wooden furniture and floors, darker colors, like red, brown and pink should become more popular. This trend might lower Dutch demand for U.S. white oak. In addition, U.S. oak faces increasing competition from oak imported from France and East European countries. The prices of French and East European oak are lower than U.S. oak and their firms can better meet the Western European specifications for flooring. Also, temperate hardwood competes with synthetic materials and laminated and foliated sheet materials, like MDF. The market share of MDF in the Dutch furniture industry should expand strongly in the near future, since new specialties, like fire-retardant and damp-resistant MDF, will increase.

Opportunities for American temperate hardwood still exist for flooring (red oak, Ponderosa pine and White pine), furniture (wood components) and construction wood (white oak, red oak, ash and tulipwood). However, U.S. need to meet the Dutch demand for fixed widths and lengths first. In addition, U.S. producers should emphasize the high quality of American temperate hardwood.

Trade

Temperate Hardwood Logs

Import Trade Matrix					Import Trade Matrix			
Country	Netherlands				Country	Netherlands		
Commodity	**Temperate Hardwood Logs**				Commodity	**Temperate Hardwood Logs**		
Time period	Jan-Dec	Units:	m3		Time period	Jan-Jun	Units:	m3
Imports for:	1999		2000		Imports for:	2000		2001
U.S.	302	U.S.	488		U.S.	341	U.S.	188
Others		Others			Others		Others	
Belgium/Lux*	43,301		34,396		Belgium	11,544		6,433
Luxembourg	--		11,112		Luxembourg	8,637		6,200
Germany	73,037		82,584		Germany	33,608		28,340
Ukraine	2,739		3,805		Ukraine	2,474		4,297
Suriname	1,398		1,406		Suriname	657		991
Total for Others	120,475		133,303		Total for Others	56,920		46,261
Others not Listed	3,726		5,962		Others not Listed	3,560		1,718
Grand Total	124,503		139,753		Grand Total	60,821		48,167
Belgium/Lux: Starting on the year 2000, Belgium and Luxembourg will be given separately.								

Export Trade Matrix					**Export Trade Matrix**			
Country	Netherlands				Country	Netherlands		
Commodity	**Temperate Hardwood Logs**				Commodity	**Temperate Hardwood Logs**		
Time period	Jan-Dec	Units:	m3		Time period	Jan-Jun	Units:	m3
Exports for:	1999		2000		Exports for:	2000		2001
U.S.	95	U.S.	0		U.S.	0	U.S.	78
Others		Others			Others		Others	
Belgium/Lux*	95,045		61,902		Belgium	34,371		34,298
Germany	1,781		1,342		Germany	455		3,772
China	727		7,613		China	4,149		10,544
Total for Others	97,553		70,857		Total for Others	38,975		48,614
Others not Listed	1,891		2,021		Others not Listed	577		1,959
Grand Total	99,539		72,878		Grand Total	39,552		50,651
Belgium/Lux: Starting on the year 2000, Belgium and Luxembourg will be given separately.								

Temperate Hardwood Lumber

PSD Table						
Country	Netherlands					
Commodity	Temperate Hardwood Lumber				1000 CUBIC METERS	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Production	140	143	145	127	0	114
Imports	290	277	295	271	0	266
TOTAL SUPPLY	430	420	440	398	0	380
Exports	60	139	65	206	0	194
Domestic Consumption	370	281	375	192	0	186
TOTAL DISTRIBUTION	430	420	440	398	0	380

Trade

Temperate Hardwood Lumber

Import Trade Matrix					**Import Trade Matrix**			
Country	Netherlands				Country	Netherlands		
Commodity	**Temperate Hardwood Lumber**				Commodity	**Temperate Hardwood Lumber**		
Time period	Jan-Dec	Units:	m3		Time period	Jan-Jun	Units:	m3
Imports for:	1999		2000		Imports for:	2000		2001
U.S.	26,090	U.S.	30,048		U.S.	4,557	U.S.	14,766
Others		Others			Others		Others	
Belgium/Lux*	34,491		25,955		Belgium*	2,895		14,711
Germany	64,202		50,502		Germany	5,674		20,291
France	43,013		41,271		France	1,593		20,533
Latvia	29,915		26,909		Latvia	10,508		15,841
Canada	17,384		7,899		Canada	1,228		2,038
Lithuania	9,916		17,589		Lithuania	4,000		10,642
Poland	8,318		12,786		Poland	1,671		5,683
Czech.Republic	4,257		8,029		Czech.Republic			4,451
Hungary	5,900		7,218		Hungary	1,850		3,043
Ukraine	4,232		10,241		Ukraine	765		5,671
Total for Others	221,628		208,399		Total for Others	30,184		102,904
Others not Listed	35,279		38,842		Others not Listed	12,199		21,327
Grand Total	282,997		277,289		Grand Total	46,940		138,997
Belgium/Lux: Starting on the year 2000, Belgium and Luxembourg will be given separately.								

Export Trade Matrix					**Export Trade Matrix**			
Country	Netherlands				Country	Netherlands		
Commodity	**Temperate Hardwood Lumber**				Commodity	**Temperate Hardwood Lumber**		
Time period	Jan-Dec	Units:	m3		Time period	Jan-Jun	Units:	m3
Exports for:	1999		2000		Exports for:	2000		2001
U.S.	328	U.S.	630		U.S.	65	U.S.	170
Others		Others			Others		Others	
Belgium/Lux*	14450		10177		Belgium*	1645		7520
Germany	8902		7663		Germany	269		2722
France	7655		6343		France	54		2199
U.K.	3169		3260		U.K.	0		1303
Hong Kong	8441		3368		Hong Kong	766		254
China	4822		1904		China	757		0
Japan	4016		9238		Japan	3265		1098
Total for Others	51455		41953		Total for Others	6756		15096
Others not Listed	4548		3095		Others not Listed	476		2685
Grand Total	56331		45678		Grand Total	7297		17951
Belgium/Lux: Starting on the year 2000, Belgium and Luxembourg will be given separately.								

Production, Supply and Distribution

Temperate Hardwood Veneer

PSD Table						
Country	Netherlands					
Commodity	Hardwood Veneer (Temperate)				1000 CUBIC METERS	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2000		01/2000
Production	0	0	0	0	0	0
Imports	7	8	0	8	0	8
TOTAL SUPPLY	7	8	0	8	0	8
Exports	2	2	0	2	0	2
Domestic Consumption	5	6	0	6	0	6
TOTAL DISTRIBUTION	7	8	0	8	0	8

In 2000, Dutch imports of U.S. temperate hardwood veneer totalled US $ 4 million, compared to US $ 3 million in 1999. Because of the high U.S. dollar-rate and the small supply of some wood species, more veneer is used instead of massive wood. U.S. temperate hardwood veneer imported into the Netherlands is mostly re-exported to Belgium and Germany for use in the furniture industry. The most important wood species are U.S. cherry and white oak. Demand for U.S. cherry and oak is still increasing, while the demand for U.S. maple, red oak, walnut and ash is decreasing. Because of changing consumer tastes, U.S. oak, cherry and maple veneers are being partly replaced by European veneers. These include European ash, alder, aspen, birch, cherry, sycamore, walnut, poplar and maple. Also, the price and quality of products from the Ukraine, which supplies oak logs for European veneer production, is said to be increasingly more competitive.

Trade

Import Trade Matrix					Import Trade Matrix			
Country	Netherlands				Country	Netherlands		
Commodity	**Hardwood Veneer (Temperate)**				Commodity	**Hardwood Veneer (Temperate)**		
Time period	Jan-Dec	Units:	m3		Time period	Jan-Jun	Units:	m3
Imports for:	1999		2000		Imports for:	2000		2001
U.S.	180	U.S.	123		U.S.	0	U.S.	1
Others		Others			Others		Others	
Belgium/Lux*	384		2,361		Belgium*	9		348
Germany	4,978		3,120		GErmany	7		1,132
Denmark	508		307		Denmark			0
Hungary	83		554		Hungary			348
Total for Others	5,953		6,342		Total for Others	16		1,828
Others not Listed	1,350		1,326		Others not Listed	0		661
Grand Total	7,483		7,791		Grand Total	16		2,490
Belgium/Lux: Starting on the year 2000, Belgium and Luxembourg will be given separately.								

Export Trade Matrix					**Export Trade Matrix**			
Country	Netherlands				Country	Netherlands		
Commodity	**Hardwood Veneer (Temperate)**				Commodity	**Hardwood Veneer (Temperate)**		
Time period	Jan-Dec	Units:	m3		Time period	Jan-Jun	Units:	m3
Exports for:	1999		2000		Exports for:	2000		2001
U.S.	80	U.S.	33		U.S.	0	U.S.	36
Others		Others			Others		Others	
Belgium/Lux*	992		417		Belgium	22		148
Spain	241		442		Spain			365
Italy	203		179		Italy			69
Poland	22		362		Poland			184
Rumania	428		46					
Total for Others	1,886		1,446		Total for Others	22		766
Others not Listed	527		521		Others not Listed	9		818
Grand Total	2,493		2,000		Grand Total	31		1,620
Belgium/Lux: Starting on the year 2000, Belgium and Luxembourg will be given separately.								